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ABSTRACT

A historian who has developed autoinstructional tape/slide lectures in East Asian history survey courses describes the steps he has found essential in production, introduces some available production and equipment resources, and points out means to enhance the effectiveness of presentations. Descriptions of his slides and accompanying commentary are given as well as a sequence of essential steps in developing the presentation. Suggestions are made for topic choice and script development. Methods for developing appropriate study aids and building in an evaluation mechanism are included. (SK)

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DESIGNING SLIDE/TAPE SELF-INSTRUCTION

A Focus and Design Session

for "On the Second Knowledge:" A Conference on Bibliographic Instruction sponsored by The Academic Library Association of Ohio, April 24 - 25, 1975, at The College of Wooster, Wooster, Ohio

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Jon Lindgren, your conference organizer, took quite a leap of faith in asking an historian to conduct a workshop on the auto-instructional use of media for a group of academic librarians. After all, historians -- and librarians for that matter -- are notoriously print oriented: "history" as a term implies the necessary existence of written records, and what would a library be without books? In this orientation, of course, we, both historians and librarians, are not alone; we mirror our society and our times: even photographs of Gerald Ford inevitably are captioned as if we would not believe our eyes without the reassurance offered by the printed words "President Ford." To ask an historian, then, to conduct a session for librarians on instructing through media is assuming quite a bit: first, that both the historian and the librarian can escape their own ingrained print bias successfully and, secondly, that they can then convince others that learning through media is a viable alternative to the book or pamphlet.

No one today, however, can deny the impact and influence of the visual image. And this power should not be -- in fact, cannot be -- overlooked by anyone engaged in teaching. Admittedly my own concern with the instructional value of non-Print materials is still in its infancy, having extended beyond the map-and-movie syndrome only in the regular incorporation of autoinstructional tape/slide lectures into my East Asian history survey courses at Cleveland State University. But I am convinced of the need to move not only towards wider use of media in instruction but also towards better utilization of non-print resources in teaching and research. After all, the cliches tell us "seeing is believing" and "a picture is worth a thousand words."

My purpose here today is threefold: to outline for you the steps I have found essential in the production of a successful tape/slide lecture to introduce you to some readily available production and equipment resources; and to point out means to enhance the effectiveness of any tape/slide autoinstructional production you might undertake. Again, let me emphasize: I possess no special expertise, beyond experience, in this particular area of media utilization. If I can do it, so can you!

First, an example of just what it is we are talking about: the following tape/slide presentation discusses and illustrates the basic steps used in the production of a tape/slide lecture, one I developed for use in several of my own history courses. As a concrete example it does not speak directly to your needs as librarians, but the basic principles it illustrates are, I believe, universally applicable -- just as the lecture itself shows the utility of media in instruction in action. In evaluation what you are about to see, you might keep in mind the primary objective behind its development: to illustrate in practice abstract principles of tape/slide lecture development. You might also listen and look for the interplay between oral and visual information, watching

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for the use of artifact, illustration, chart and music in relationship to narrative, quotation, summary, transition and analysis. Following the show, I will distribute a sheet summarizing the principles discussed -- so do not panic if it all doesn't sink in on the first "go-round."

"Japan on the Eve of Westernization"
An Example in Tape/Slide Lecture Development

Slide Number/Commentary

1 My first experience with the tape/slide format took place in 1971 when I put together a three screen multimedia extravaganza on the Gilded Age for my freshmen American history survey section.

2 Then in March 1973, I received an Instructional Assistance Grant from the Center for Effective Learning at the Cleveland State University -- the princely sum of $165.00 -- with which to develop a series of four auto-instructional tape/slide lectures on Japanese cultural history.

3 With these experimental trials behind me, having by then developed a handle on some of the techniques involved, I could see some particular advantages to continuing my exploration of the tape/slide format for instructional use.

4 I had found for instance that --
- --the tape/slide format made it possible to program material efficiently and effectively while at the same time maintaining a high level of student interest;
- --it permitted illustrative support of the subject matter being covered, an especially important consideration when dealing with unfamiliar cultures and modes of conduct: and
- --it allowed immediate visual reinforcement of points made verbally, repeatable at will.

With appropriate support materials -- a study guide and a copy of the script, for example -- its usefulness as a teaching aid became even more obvious.

5 I often find myself now, as a result of these discoveries, approaching new subject matter, even new areas of research interest, very aware of the visual and very alert to the possiblilities of a tape/slide lecture.

6a So it was in late March of 1974 when, while in Boston for the annual meeting of the Association for Asian Studies, I looked in on the Peabody Mu-
6b seum in nearby Salem (Which I understood at the time had a number of exhibits related to the China Trade, a subject with which I deal in the 2nd half of my East Asia survey course.)

7 Tucked off in a back corner room on the second floor, however, I found something even more fascinating than the paintings and export porcelain displayed elsewhere -- the Edward Sylvester Morse Collection of Japanese Ethnology.

To understand something of the impact of this discovery, let me point out that I have always been particularly fascinated by that period in Japanese history lasting from 1600 to 1868. This, the Tokugawa period, was the era during which Japan, purposefully isolated from contact with the West, developed a uniquely indigenous cultural style centering in urban areas such as

8 Edo (the modern city of Tokyo), Kyoto and Osaka. I had even chosen to do graduate work at Stanford University in California partially because the acknowledged expert in Tokugawa studies was there. But along the way, as so often happens, I had been forced by circumstances to abandon that particular field of inquiry -- that is, until that day in March, 1974, when I discovered the Morse Collection.

9 Edward Sylvester Morse, Director of the Peabody Museum in the late 19th and early 20th centuries and a reknown naturalist, went to Japan in 1877 to pursue his life-long interest in seashells, particularly that class of shells called brachopods.

10 Shells he found in aburdance on Japanese beaches and along riverbeds, but he also found himself increasingly intrigued by the culture and civilization of the people around him, particularly the traditional culture of the Tokugawa peiod, now nine years gone as a political entity but still very much alive as the basis for Japanese social, economic and cultural life.

11 Realizing at the same time that this traditional lifestyle was being challenged and quickly overrun by the headlong rush of the Japanese to westernize and modernize their long secluded island nation, Morse began systematically to collect artifacts associated with traditional Japanese culture and society, concentrating particularly on those items connected with the common classes of the Tokugawa period.

12 Trained as a draughtman, Morse also sketched the Japan he saw, recording in precise detail elements of the lifestyles he observed everywhere around him.

13 His stetches of Japanese homes formed the basis for a book, Japanese Homes and Their Surroundings, which appeared in 1886. This abundantly illustrated book profoundly influenced the American architectural community -- especially the work of Frank Lloyd Wright -- and "made an enoroums contribution to the modern mode in architecture and living" in the United States.

14 Morse's unique porcelain collection, the outgrowth of another of his many interests, eventually went to the Boston Museum of Fine Arts together with pottery unearthed in the archeological digs he initiated in Japan -- among other contributions. In Japan, Morse, besides establishing the zoology chair at Tokyo Imperial University and introducing the Japanese to the theories of Darwin, also discovered Japanese prehistory, in the process ini-

15 His primary collection of traditional Japanese artifacts, however, went to the Peabody Museum in Salem (upon his return to the United States) and became the basis for that unique collection with which I became fascinated in March of 1974.

16 An idea for a tape/slide lecture came to me on that occasion almost immediately, the topic: "Japan on the Eve of Westernization." The subject was one which would fit into already existing courses and which would serve as well as a good introduction to a graduate seminar in early modern Japan I was putting together for the 1974-1975 academic year.

17 Shortly thereafter I received another Center for Effective Learning grant to underwrite the project and I was on my way.

18 First I had to gather my resources. Exploration turned up a biography of Morse, a two volume illustrated travel diary of his years in East Asia entitled Japan Day by Day, and his book on architecture, Japanese Homes and Their Surroundings.

19 Each proved useful, generating potentially needed background information and pertinent contemporary quotations.

20 Photographs and sketches included in these volumes became basic visual resources.

21 Other possiblilities turned up in illustrated histories of Japan, contemporary published travel diaries, art books and museum catalogs in my own collection or in local libraries.

22 Then came a return trip to the Peabody Museum in early September.

23 At first I concentrated my attention here on getting to know the Morse Collection and the other museum resources on Japan in the catalog, the library and the reference collection, particularly.

24 Among other finds, made during this exploratory period, I unearthed a photograph collection dating from the late 19th century, drawers full of scrolls and hangings, dozens of woodblock prints, thousands of fascinating objects, a number of Morse's original sketches, his personal library and his complete collected reminiscences!

25 I soon had more than enough raw material and data with which to work.

26 The task became that of combining the two. Sequestered in the curator's office I set out to accomplish just that.

28 First I set three basic instructional objectives for the completed tape/slide lecture: I decided that

--Having viewed the tape/slide lecture "Japan on the Eve of Westernization," students, in the ensuing discussion, should be able to demonstrate to the satisfaction of the instructor an understanding of the following interpretive insights that --

1. the military-bureaucratic style of the Tokugawa period in Japan grew out of the preceding cultural styles of the Familial, Aristocratic and Military-Aristocratic periods and contained within it important elements illustrative of that historical continuity in terms of political, economic, social, religious and cultural values and institutions; that --
2. the impostion of the status quo orientation of the Tokugawa political system on Japanese life after 1600 failed to stem the modernization process in Japan; and that --
3. the end product of this modernization process provided Japan in the late 19th century with a rich and complex cultural environment both challenged and threatened by the arrival of the West in 1854.

29 I would begin the lecture itself with a discussion -- brief and to the point -- of the establishment in Japan of the Tokugawa political system of centralized feudalism in the years after 1600.

30 In so doing I chose to emphasize those key elements illustrative of Tokugawa dedication to seclusion and to maintenance of the status quo, then to use these same characteristics to show how change had been impossible to prevent.

31 Next I decided the lecture should investigate elements characteristic of late Tokugawa social and cultural life, particularly aspects that could be illustrated with reference to the Morse Collection.

32 Rural values, urban sophistication, homes and shops, children's toys and games, clothing styles, occupations, leisure time activities -- all suggested themselves at this point as worthy topics for consideration.

33 The last section would introduce Morse and concentrate on the impact of the westernization process in Japan apparent by the late 1870's.

34 To fit the appropriate visual images into this general outline became the next order of business. I eventually chose 167 items (or groups of items) to be photographed by the resident museum photographer.

35 Everything from old lantern slides to ivory figurines, wooden shop signs, old photographs, miniature models, sketches, sets of tools and theater posters ended up on the master slide list. As of late September, 1974, I had accomplished this much.

36 The next step was to take the master slide list, my general outline and work up a script.

37 Work on the actual script meant returning as well to earlier resources for support, for quotations, for elaborating detail and, at times, for visual
38 material needed to fill in unanticipated gaps.

By December, when my slides were ready, most of this work was completed, leaving only slide arrangement, recording and snychronization yet to be accomplished.

39 Completion traget date was early January, 1975. Anticipated cost: around $300, including the trip to Salem. The final product? A forty minute illustrated lecture, "Japan on the Eve of Westernization" -- a lot of work but more than worth the effort -- and fun besides.

In retrospect the following appear to me to represent the essential steps and sequence of events involved in the creation of this particular tape/ slide lecture;

40 -- choose a topic/ a theme;
41 -- assemble resources;
42 -- complete background reading
43 -- explore visual possibilities;
44 -- construct topical outline; select visuals to fit;
45 -- write full script; check completed script for accuracy;
46 -- add visuals where needed;
47 -- arrange slides; preview and check for appropriate continuity, both visual and aural; record script; and synchronization;
48 -- audition; revise (if necessary); add appropriate study aids; and
49 -- use frequently to justify the expenditure of time and resources!

Any questions?

"The Makela Method"
Tape/Slide Lecture Production

Sequencing the Essential Steps

1. Choose a topic/theme for the tape/slide lecture.
2. Assemble media and print resources.
3. Complete background reading and explore visual possiblilities.
4. Construct a topical outline of material to be covered in script.
5. Select visuals to fit into general outline.
6. Write full script in light of general topical outline and visual material available.
7. Check completed script for accuracy and add visuals where needed.
8. Arrange slides.
9. Preview completed script and slides, checking for appropriate continuity -- both aural and visual.
10. Record script (with background music).
11. Add synchronization to tape for automated use.
12. Audition completed tape/slide lecture for public reaction and evaluation.
13. Revise tape/slide lecture if necessary.
14. Add appropriate study aids.
15. Use frequently to justify the expenditure of time and resources!

(A brief discussion/question period follows tape/slide lecture and distribution of mimeographed sheet outlining production steps.)

Now let me turn to a brief exerpt from the finished tape/slide lecture, the development of which was outlined in the previous presentation. This example uses a second means of presentation, one I highly recommend for group use to ease eye fatigue in longer productions and to increase the sense of visual flow. The method uses two slide projectors, a dissolve unit and a cassette tape unit with automated playback capabilities. Notice in this excerpt once again the interrelationship between the spoken narrative, the musical background and the variety of visual material used.

"Japan on the Eve of Westernization"
A Tape/Slide Lecture

Excerpt

Slide Number — Commentary

1-4 Title Slides

5 In the closing decades of the sixteenth century, following nearly 100 years of almost constant warfare and feudal disarray, a series of strong military figures emerged in Japan seeking to pacify and reunify the country.

6 The process was completed under the aegis of Tokugawa Ieyasu, the third and most powerful of these unifying figures.

7 Independently wealthy -- with an estimated annual income ten times that
8 of its nearest rival -- the Tokugawa family under Ieyasu's leadership also proved its military prowess on the battlefield at Sekigahara in 1600 at the head of a powerful military alliance.

9 Thereafter during the early decades of the seventeenth century the family began the laborious process of establishing a stable and peaceful order in Japan while seeking as well to preserve its superior political, military and economic position.

10 The Japanese Emperor was prevailed upon to name Tokugawa Ieyesu shogun, or "military dictator," thus utilizing the religious aura traditionally attached to imperial sanctification to establish recognizable legitimacy for the family's newly consolidated political position.

11 Ieyasu thereupon established an independent military government, the bakufu, to oversee the administration of the newly centralized state. He also chose to govern from the city of Edo (the modern Tokyo) far from the Buddhist temples and the stultifying aristocratic intrigues of the imperial court in Heian (the modern Kyoto and traditional seat of government in Japan since 794).

12 From Edo between 1600 and 1868 Tokugawa Ieyasu and his successors presided over a form of government termed "centralized feudalism" by modern historians.

Ground in the feudal obligations of inferior to superior, "centralized feudalism" bound not only samurai warrior to daimyo lord but also daimyo lord to Tokugawa shogun and Tokugawa shogun to emperor, thereby politically unifying Japan into a single national entity.

Slide Number	Commentary
13	At the same time, "centralized feudalism" allowed economic and political power within the system to remian diffused and decentralized although in theory subject to Tokugawa control attempts and obviously overshelmed by Tokugawa superiority. Daimyo lords retained direct local economic and political control over their private domains, pledging only loyalty and military support to their Tokugawa overlords.
14a	Therefore to guarantee some semblance of political control over the 250 or more daimyo scattered through the Japanese islands and to staff bakufu administrative ranks, the Tokugawa ranked each local daimyo family according to its degree of expected trustworthiness.
14b	Shimpan or kamon daimyo, directly related to the Tokugawa family, were considered the most loyal: three in fact were given the right to supply an heir should the Tokugawa line itself fail.
14c	Fudai daimyo, those who had pledged personal loyalty to the Tokugawa family before the Battle of Sekigahara in 1600, were also considered loyal and allowed to serve in bakufu administrative posts.
14d	Tozama daimyo -- whether friend or foe -- were so designated because they submitted to Tokugawa authority only after 1600. They were barred from all participation in bakufu affairs and, furthermore, were often resettled in areas far from bakufu headquarters at Edo and surrounded by buffer domains in the hands of trustworthy fudai daimyo.
15	The bakufu regualted the smi-autonomous daimyo in other ways as well: it forbid internarriage betwwen daimyo families without prior permission. It did not permit direct interdomain communication; even castles could not be repaired without first securing bakufu authorization.
16	The sankin-kotai, or "alternate attendance," system required daimyo to spend approximately half their time in attendance on the bakufu in Edo and to leave wives and children behind as hostages whenever they returned to their local holdings.
17	In addition the bakufu could assess local daimyo for public works projects needed within local domains -- to keep roads open and post stations in suitable repair, for example.
18	To control society below the level of daimyo the Tokugawa enforced strict separation between the four officially established class divisions: samurai, peasant, artisan and merchant.
19	The ruling samurai warrior class was moved bodily into the castletowns surrounding domain headquarters, therby accelerating a trend begun earlier serving to divide the ruling elite from their agricultural roots.

Slide Number — Commentary

20 An annual stipend based on the rice yeild from former holdings was paid each samurai, and each enjoyed special privileges as well, such as the rights to wear swords and "to cut down on the spot any (commoner) who offended them." (Varley, p. 115)

21 The peasant was accorded a privileged position among the three classes because he contributed the basic foodstuffs on which the total society depended.

22 Artisans contributed to society the products of their labors, and therefore, were ranked third on the social scale.

23 Because official Confucian canon on which this class division was premised interpreted the role of the merchant as essentially non-productive, involving only the transportation of goods from one locale to another, merchants were placed at the bottom of the social hierarchy.

24 In reality, however, the artisan and the merchant in Japan, as urban dwellers, were grouped together as chonin, or "townsmen."

25 To further bakufu control over Japan, the Tokugawa family also moved to eliminate threatening foreign influences by banning Christianity altogether and by adopting a policy of national secuision from contact with the outside world.

26 While trade with China was allowed to continue on a carefully restricted and regulated basis both directly and through the Ryukyu Islands. The bakufu after 1640 permitted only one Dutch ship per year to land at an artificially constructed island in the Tokugawa-controlled port at Nagasaki.

27 All other contact was outlawed; even Japanese fisherman washed ashore on foreign soil by Pacific storms were forbidden to return home on pain of death.

28 To buttress their newly centralized military, economic, political and social control over Japan, the Tokugawa relied on the philosophical principles of Neo-Confucianism.

Neo-Confucianism proved enormously useful in justifying ideologically the centralized feudal structure of state and society emerging in Japan in the seventeenth century.

29 Imported from China centuries earlier and kept alive since then by intellectual Zen Buddhist monds, Neo-Confucianism emerged as a major influence only in the Tokugawa period.

30 Its agricultural orientation also accorded with Tokugawa predilections.

31 Having established the military superiority and enjoying a decided economic edge, the Tokugawa family moved to establish in Japn after 1600 a system of centralized feudalism legitimized by Imperial sanction and justified by Neo-Confucianism.

Slide Number

32 Its attempt to structure, stratify, regulate and restrict Japanese political, economic, and social life brought peace and a stable political order to Japan which lasted over 250 years.

(Following the tape/slide presentation, a brief discussion/question period on production and play back equipment introduces participants to slide copying techniques (using a 35 mm camera, tripod, non-glare glass and/or a Kodak Visualmaker kit), tape production needs (a tape recorder -- preferably cassette -- records or live music, script, interviews, narrator (s), and six possible modes of presentation: projector + script; projector + taped and "beeped" narration; projector + automated taped narration; Singer Carramate; vidotape; two projectors + automated taped narration + dissolve unit for groups.)

Making the above equipment pay off in worthwhile instruction in the use of bibliographic resources, however, is properly not a matter of technical mastery but rather one of effective "software:" a good tape/slide presentation. Achieving that is the key to success in using slide/tape self-instruction. Let me, then, mention some specific suggestions on increasing software effectiveness:

1. Choose and develop your topic wisely -
   a. establish a clear set of instructional objectives geared to a known audience;
   b. avoid abstractions, problems of organization and structure unless visualization possiblities are available -- material presented must be both illustratable and easily grasped through visual presentation;
   c. avoid the overly complex.

   (EXAMPLES DRAWN FROM TAPE/SLIDE LECTURE, SLIDES E32-34)

2. Use media resources imaginatively: visual variety is the key -- any slide held longer than eight seconds is apt to bore whatever the narration is saying -- so even if the underlying theme persists, use a number of illustrations.

   (EXAMPLES DRAWN FROM TAPE/SLIDE LECTURE, SLIDES E7-9)

   Other possible sources of variety include -
   a. using different shots of the same object from various perspectives;
   b. altering the object in some way or using related artifacts;
   c. using charts, maps, graphs, outlines, cartoons, even drawing on slides in addition to "real life" photos and copied illustrations;
   d. intermixing color and black and white, vertical and horizonatal planes, masking or splitting slides for on-screen visual variation.

3. Develop an effective script -
   a. limit objectives;
   b. intersperse narrative with quotation, analysis, summary and clarifying transitions;

3. C. strive for aural clarity -- remember no visual cues or accessible written referral sources are usually readily available.

(EXAMPLES DRAWN FROM TAPE/SLIDE LECTURE, SLIDES 024-31)

4. Keep background music in the background: avoid loud, familiar, distracting music; strive for reasonalble authenticity and mood tie-in.

(EXAMPLE DRAWN FROM TAPE/SLIDE LECTURE, SLIDES 1-2)

5. Develop clear relationships between visuals and narrative to avoid unexplained mysteries, realizing that -
   a. visuals can reinforce and complete the sense of the narrative;
   b. the narrative can reinforce and complete the sense of the visuals;

   (EXAMPLES DRAWN FROM TAPE/SLIDE LECTURE, SLIDES E37-037

   c. visuals can establish an interpretation, introduce humor, a note of irony or paradox into the narrative context;

   (EXAMPLE DRAWN FROM TAPE/SLIDE LECTURE, SLIDE E42)

   d. visuals can act as "fillers," redirecting attention to the narrative.

   (EXAMPLES DRAWN FROM TAPE/SLIDE LECTURE, SLIDES E17 and 018)

   e. visuals can stand alone, focusing attention, permitting discovery, allowing experiential moments or establishing mood.

   (EXAMPLES DRAWN FROM TAPE/SLIDE LECTURE, SLIDES E46-104)

   (Supplementary examples drawn from tape/slide lecture: problem series - slides 5-11, 25, 28-30, 69, 70, 81;
   success series - slides 20-24, 27, 34, 82.)

6. Select and develop appropriate instructional study aids - a study guide, a copy of the script, a series of directed discussion questions; a series of visual literacy exercises, an explanatory introduction, a follow-up discussion; a practicum giving direct experience in handling the subject matter of the presentation.

7. Build in an evaluation mechanism to test effectiveness and success in achieving stated objectives.

Following these suggestions may not result in a perfect program, but they should help produce an effectively organized and efficient media presentation.

In conclusion, it appears to me at this point in my own work with this format that there are four keys to the development of a successful slide/tape self-instruction program in bibliographic techniques -- or any other area:

1. Follow an established implementation procedure;
2. Know your equipment, subject matter and audience -- both strengths and weaknesses, possibilities and limitations.
3. Develop appropriate instructional objectives, study aids and evaluation instruments.

4. Establish useful visual/narrative interrelationships through innovative use of media resources and imaginative scripting.

I hope that I have inspired you at least to give this instructional technique a whirl: designing slide/tape self-instruction can be both fun and a rewarding educational exercise.

Thank you.